Economic
Impact
of Airports in
North Carolina





2016

Economic Impact of Airports in North Carolina

Airports are a critical piece of North Carolina's transportation system. This report shows how airports support our state's economy and link N.C. globally.

To see how these impressive numbers were calculated, turn to the blue tabbed pages titled "DATA BY AIRPORT" to view the numbers per each airport.

ECONOMIC IMPACT

JOB CREATION

BUSINESS ACTIVITY

MILITARY SUPPORT

UNMANNED AIRCRAFT

STATE SUPPORT

DATA BY AIRPORT





123,400Aviation Related Jobs





Airports' Impact on North Carolina's Economy

North Carolina is served by a robust network of airports.

Airports are a critical part of North Carolina's transportation system, linking our state to the global economy and generating economic activity, commerce, and tourism. Seventy-two publicly owned airports in N.C. are supported annually with funds from the state for infrastructure and development projects. This report shows how these airports are significant economic engines in our state and contribute:

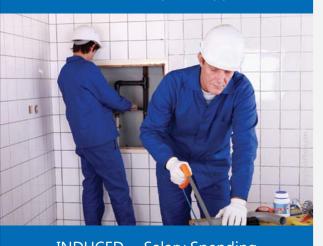
- \$31 billion annual economic impact
- 123,400 airport-related jobs
- \$913 million in direct government revenue

North Carolina aviation serves everyone in our state. The economic reach of airports extends far beyond pilots and operators by supporting:

- Time-sensitive, high-value cargo and freight transport
- People, both for business and pleasure travel
- Fire fighting and medical emergency
- Search and rescue
- Military
- Agriculture
- Aerospace industry
- Tourism

Mitchell

DIRECT = Airport Jobs



INDIRECT = Airport Suppliers



How Do Airports Contribute to the Economy?

Jackson

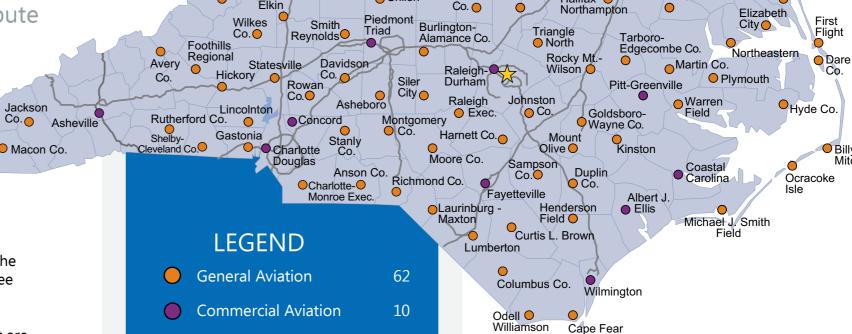
Macon Co.

North Carolina airports contribute to the state's economy primarily through three impact categories:

DIRECT impacts result from firms that are directly engaged in the movement of people or goods through an airport, such as airline employees and rental car companies.

INDIRECT impacts result from spending by airport-related firms on products and services provided by support businesses, such as office supply companies, property maintenance, and other organizations.

INDUCED impacts result from payroll expenditures by employees of directly and indirectly related firms that produce successive spending, such as purchasing a new car, computer, or high-definition television.



Person

Rockingham Co.Shiloh

Henderson-

Halifax-

Oxford

The 72 North Carolina public use airports consist of 10 commercial air carrier airports and 62 general aviation airports providing vital and considerable economic impacts. Continued investment in aviation is making North Carolina a leader in the aerospace industry and aviationdriven commerce.

Interstate Highways

The impacts generated from each airport

are tabulated by group on pages 14 and 15.

Mount Airy

Surry Co.

Ashe Co.

"Airports mean jobs—on the airport, supporting the airport, and supporting the businesses that utilize and rely on them."

> — Bobby Walston, Director NCDOT Division of Aviation

Currituck Co.

Tri-Co.

Businesses frequently evaluate local commercial and general aviation airports when considering new sites for manufacturing operations and corporate headquarters.

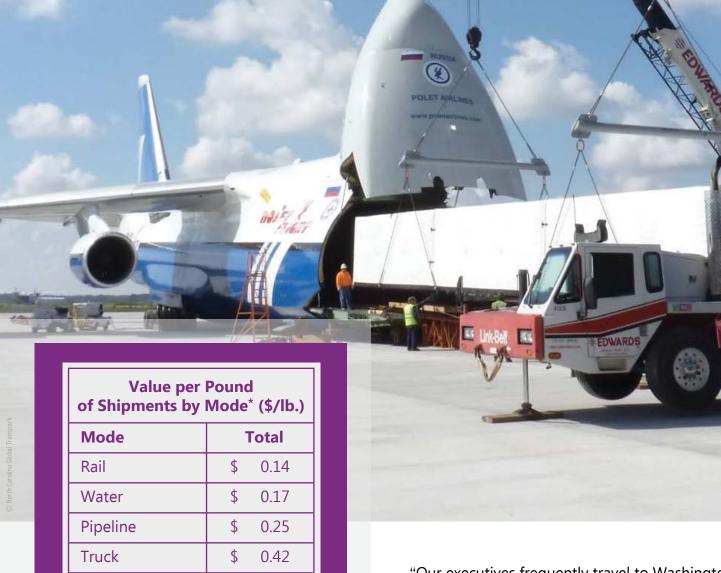
Airports play an important role in attracting and retaining businesses in local communities. Communities with access to airport services offer a significant competitive advantage connecting people and goods to the global economy. In an economy highly dependent on high-tech manufacturing jobs, the ability to move time-sensitive, high-value cargo throughout North Carolina is critical.

Since our last airport economic impact study in 2012, the partnership between North Carolina airports and business communities has continued to grow. Airport-related employment has grown 13 percent since 2012, and airports have created an additional \$5 billion in annual economic output. In addition to the activity that occurs as a result of airports, an additional \$10.5 billion in economic activity is supported by North Carolina's aerospace manufacturing industry, which results in approximately 42,600 jobs across the state. Airports and aerospace manufacturing support 8.5 percent of North Carolina's total Gross State Product.

\$10.5 Billion Economic Impact



Aerospace Manufacturing Industry



Aircraft primarily transport highvalue goods and facilitate the efficient transportation of these goods to consumers. The value of goods transported by air far exceeds that of other modes of transportation.

\$ 39.40

Air/Air + Truck

"Our executives frequently travel to Washington, D.C. and Nashville, Tennessee. Having a good airport in our county means that we can make day trips out of what would otherwise be a three day trip if we flew commercially. The airport is critical to our sales team and our executive team."

— Phil Drake, CEO Drake Enterprises BUSINESS

* From 2012 statistics

Critical Military Support

North Carolina's military installations attract private defense companies, which prefer to locate close to military facilities.



Approximately **200,000** military aircraft operations are conducted at public access airports statewide.

Key Military Aviation Locations

- (1) Pope Field at Fort Bragg Army Base, Fayetteville
- 2 Seymour Johnson Air Force Base, Goldsboro
- (3) Marine Corps Air Station Cherry Point, Havelock
- 4 Marine Corps Air Station New River, Jacksonville
- (5) Elizabeth City Coast Guard Air Station

N.C. National Guard:

- (6) 145th Airlift Wing, Charlotte-Douglas and Stanly County
- 449th Theater Aviation Brigade, Raleigh-Durham
- 8 449th Theater Aviation Brigade, Rowan County



"From the birth of early aviators to supporting America's fighting forces and veterans, the support N.C. airports provide our military is essential!"

— Secretary Cornell A. Wilson, Jr. N.C. Department of Military and Veterans Affairs Retired US Marine Corps Major General

Each branch of the United States Armed Forces relies on North Carolina airports to conduct military operations in our state. Approximately 200,000 military operations occurred at public access airports in North Carolina in 2014. These operations — conducted by the Air Force, Army, Coast Guard, Marines, Navy, and N.C. National Guard — are crucial for national security and troop preparation.

Local economies in North Carolina also benefit from military presence at our airports. Local businesses provide military personnel with aircraft fuel as well as personal accommodations, meals, and supplies. The majority of our state's public airports support seasonal, occasional, weekly, or daily military operations.

Unmanned Aircraft Systems

North Carolina law has placed the responsibility of implementing testing and permitting systems for UAS operation with the NCDOT Division of Aviation.

Unmanned aircraft systems (UAS), also called drones, have the potential to change the way we approach agriculture, public safety, construction, and many other important industries in North Carolina. As a leader in UAS/drone implementation, the NCDOT demonstrates the legal way to use this beneficial and safe technology. The Division of Aviation's goal is to make sure that UAS/drone operations in North Carolina are safe and responsible.

Predictions indicate UAS activities in North Carolina have the potential to create \$918 million in annual economic impact and support 1,160 jobs.

The Federal Aviation Administration (FAA) has exclusive authority over the use of airspace in the United States, including airspace used by UAS/drones. North Carolina has authority to implement and manage regulations that pertain to state laws concerning UAS operators and where operations originate and terminate.

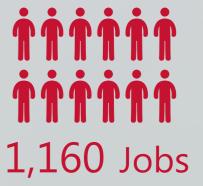
With Session Law 2014-100, the North Carolina General Assembly granted the Division of Aviation the responsibility to implement testing and permitting systems for UAS operation in North Carolina.

The Division of Aviation encourages individuals and organizations to take time to make sure they understand and comply with all UAS/drone regulations outlined at www.ncdot.gov/aviation/uas/





\$918 Million Economic Impact



10

Division of Aviation's Role

The Division of Aviation promotes North Carolina's economic well-being through air transportation system development and improved aviation safety and education.

The NCDOT Division of Aviation, headquartered and located at Raleigh-Durham International Airport (RDU), is responsible for all aviation functions regarding state airport and aviation system planning and development. It also provides funding to communities for constructing and improving airports throughout the state.

North Carolina has 72 publicly owned airports and nearly 300 privately owned airports. Ten airports have regularly scheduled airline service and four serve international destinations. There are more than 7,000 registered aircraft based in the state and 14,000 licensed pilots.

More than 56 million passengers fly to and from North Carolina each year, and more than 1.3 billion pounds of air freight originate in the state. The Division of Aviation offers a number of services, including NCDOT state aircraft services as well as safety and education support. The Division is also responsible for the operations and maintenance of NCDOT's four aircraft.





56 Million 2.3 Billion 2.3 Pounds of Air Freight



Airport Impact Data

ANNUAL ECONOMIC IMPACT

Impact Type	Commercial Aviation	General Aviation (GA)	Total
Direct	\$7,484,560,000	\$2,736,650,000	\$10,221,210,000
Indirect	\$9,046,760,000	\$808,510,000	\$9,855,270,000
Induced	\$10,610,530,000	\$491,080,000	\$11,101,610,000
Total	\$27,141,850,000	\$4,036,240,000	\$31,178,090,000

JOBS SUPPORTED

Commercial	GA	Total
30,060	10,550	40,610
42,460	5,350	47,810
21,000	2,660	23,660
99,810	23,610	123,420



^	1											
Commercial			Employment (jobs)		Estimated Payroll Income (dollars)		Total State and					
L		Airport ID and Name	City/Town	Direct	Indirect	Induced	Total	Direct	Total	Direct	Total	Local Taxes (dollars)
	OAJ	Albert J. Ellis	Jacksonville	\$45,560,000	\$114,420,000	\$77,140,000	\$237,120,000	150	370	\$7,770,000	\$12,240,000	\$4,908,000
	AVL	Asheville Regional	Asheville	\$116,170,000	\$245,220,000	\$194,270,000	\$555,660,000	750	1,680	\$22,160,000	\$39,110,000	\$9,609,000
	CLT	Charlotte Douglas International	Charlotte	\$4,740,250,000	\$3,914,610,000	\$4,936,940,000	\$13,591,800,000	18,240	61,590	\$1,321,630,000	\$2,212,690,000	\$551,973,000
	EWN	Coastal Carolina Regional	New Bern	\$28,230,000	\$83,810,000	\$67,070,000	\$179,110,000	180	560	\$7,550,000	\$13,310,000	\$3,376,000
	JQF	Concord Regional	Concord	\$97,670,000	\$42,950,000	\$20,320,000	\$160,940,000	1,140	1,940	\$16,980,000	\$42,960,000	\$3,162,000
	FAY	Fayetteville Regional/Grannis Field	Fayetteville	\$57,320,000	\$151,480,000	\$103,720,000	\$312,520,000	320	610	\$13,080,000	\$18,680,000	\$6,636,000
	GSO	Piedmont Triad International	Greensboro	\$477,030,000	\$653,200,000	\$823,060,000	\$1,953,290,000	2,200	8,410	\$116,520,000	\$229,710,000	\$55,596,000
	PGV	Pitt-Greenville	Greenville	\$22,230,000	\$46,560,000	\$34,610,000	\$103,400,000	160	340	\$4,980,000	\$8,040,000	\$2,127,000
	RDU	Raleigh-Durham International	Raleigh/Durham	\$1,236,790,000	\$3,199,980,000	\$4,141,410,000	\$8,578,180,000	6,330	21,340	\$319,080,000	\$593,930,000	\$143,570,000
	ILM	Wilmington International	Wilmington	\$760,980,000	\$637,480,000	\$232,310,000	\$1,630,770,000	1,730	4,910	\$44,700,000	\$83,440,000	\$12,319,000
		Δ	IR CARRIER TOTAL	\$7 484 560 000	\$9,046,760,000	\$10,610,530,000	\$27 141 850 000	30.060	99 810	\$1,857,470,000	\$3 211 150 000	\$790 114 000

GENERAL AVIATION

Access the full report online at www.ncdot.gov/aviation

7/	General Aviation	City/Town	Output (dollars)				Employme	ent (jobs)	Estimated Payroll Income (dollars)		Total State and
	Airport ID and Name		Direct	Indirect	Induced	Total	Direct	Total	Direct	Total	Local Taxes
AFP	Anson County - Jeff Cloud Field	Wadesboro	\$15,410,000	\$1,750,000	\$800,000	\$17,960,000	20	40	\$900,000	\$1,350,000	\$249,000
GEV	Ashe County	Jefferson	\$28,440,000	\$4,030,000	\$2,210,000	\$34,680,000	120	260	\$2,960,000	\$5,020,000	\$460,000
HBI	Asheboro Regional	Asheboro	\$6,060,000	\$3,280,000	\$3,670,000	\$13,010,000	50	130	\$2,740,000	\$4,460,000	\$367,000
7A8	Avery County/Morrison Field	Spruce Pine	\$9,070,000	\$3,850,000	\$1,310,000	\$14,230,000	70	130	\$2,310,000	\$3,620,000	\$330,000
HSE	Billy Mitchell	Hatteras	\$430,000	\$890,000	\$320,000	\$1,640,000	<10	10	\$90,000	\$170,000	\$5,000
BUY	Burlington-Alamance Regional	Burlington	\$64,640,000	\$29,010,000	\$20,710,000	\$114,360,000	330	720	\$20,360,000	\$32,500,000	\$3,100,000
SUT	Cape Fear Rgnl Jetport/Howie Franklin Fld	Oak Island	\$129,140,000	\$46,230,000	\$39,760,000	\$215,130,000	760	1,710	\$38,250,000	\$61,160,000	\$5,924,000
EQY	Charlotte-Monroe Executive	Monroe	\$8,340,000	\$6,820,000	\$7,700,000	\$22,860,000	60	140	\$3,250,000	\$5,380,000	\$703,000
CPC	Columbus County Municipal	Whiteville	\$94,360,000	\$20,710,000	\$6,910,000	\$121,980,000	170	380	\$14,830,000	\$22,580,000	\$15,521,000
ONX	Currituck County Regional	Currituck	\$2,400,000	\$2,950,000	\$2,120,000	\$7,470,000	20	40	\$1,420,000	\$1,840,000	\$129,000
EYF	Curtis L Brown, Jr. Field	Elizabethtown	\$2,780,000	\$730,000	\$670,000	\$4,180,000	10	30	\$620,000	\$720,000	\$284,000
MQI	Dare County Regional	Manteo	\$7,630,000	\$2,640,000	\$1,600,000	\$11,870,000	60	100	\$1,750,000	\$2,630,000	\$368,000
EXX	Davidson County	Lexington	\$21,140,000	\$5,080,000	\$3,420,000	\$29,640,000	140	240	\$5,900,000	\$8,040,000	\$901,000
DPL	Duplin County	Kenansville	\$18,200,000	\$6,800,000	\$2,330,000	\$27,330,000	90	190	\$29,800,000	\$47,340,000	\$559,000
ECG	Elizabeth City CG Air Station/Regional	Elizabeth City	\$205,550,000	\$145,000,000	\$33,260,000	\$383,810,000	990	2,540	\$23,300,000	\$74,110,000	\$8,413,000
ZEF	Elkin Municipal	Elkin	\$2,070,000	\$2,090,000	\$1,500,000	\$5,660,000	20	30	\$540,000	\$770,000	\$138,000
FFA	First Flight	Kill Devil Hills	\$400,000	\$4,040,000	\$1,820,000	\$6,260,000	<10	10	\$90,000	\$170,000	\$5,000
MRN	Foothills Regional	Morganton	\$1,220,000	\$1,930,000	\$970,000	\$4,120,000	10	20	\$260,000	\$450,000	\$74,000
AKH	Gastonia Municipal	Gastonia	\$1,580,000	\$2,310,000	\$2,010,000	\$5,900,000	10	30	\$550,000	\$1,000,000	\$130,000
IXA	Halifax - Northampton Regional	Roanoke Rapids	\$6,870,000	\$2,170,000	\$1,080,000	\$10,120,000	50	90	\$1,650,000	\$2,420,000	\$283,000
HRJ	Harnett Regional Jetport	Erwin	\$107,050,000	\$18,470,000	\$12,440,000	\$137,960,000	150	400	\$13,970,000	\$19,860,000	\$2,316,000
ACZ	Henderson Field	Wallace	\$1,180,000	\$1,140,000	\$400,000	\$2,720,000	10	20	\$210,000	\$350,000	\$56,000
HNZ	Henderson-Oxford	Oxford	\$980,000	\$2,010,000	\$1,150,000	\$4,140,000	10	20	\$240,000	\$330,000	\$69,000
HKY	Hickory Regional	Hickory	\$15,120,000	\$5,830,000	\$4,150,000	\$25,100,000	70	160	\$3,150,000	\$5,110,000	\$552,000
7W6	Hyde County	Englehard	\$360,000	\$240,000	\$170,000	\$770,000	<10	10	\$90,000	\$120,000	\$11,000
24A	Jackson County	Sylva	\$360,000	\$340,000	\$240,000	\$940,000	<10	10	\$80,000	\$110,000	\$14,000
JNX ISO	Johnston County Kinston Regional Jetport at Stallings Field	Smithfield	\$71,850,000	\$19,450,000	\$16,540,000	\$107,840,000	250	600	\$17,080,000	\$30,370,000	\$8,655,000
MEB	0 . 0	Kinston	\$386,280,000	\$41,710,000	\$24,280,000	\$452,270,000	600	1,350	\$28,290,000	\$48,290,000	\$4,774,000
IPJ	Laurinburg-Maxton	Maxton Lincolnton	\$27,910,000	\$16,770,000 \$4,190,000	\$4,010,000 \$1,910,000	\$48,690,000 \$11,160,000	360	560 70	\$16,750,000 \$1,500,000	\$33,950,000 \$2,540,000	\$1,070,000 \$367,000
LBT	Lincolnton-Lincoln County Regional Lumberton Municipal	Lumberton	\$5,060,000 \$4,910,000	\$2,580,000	\$1,360,000	\$8,850,000	30 30	50	\$760,000	\$1,100,000	\$437,000
1A5	Macon County	Franklin	\$7,020,000	\$3,260,000	\$1,930,000	\$12,210,000	50	110	\$1,850,000	\$2,910,000	\$315,000
MCZ	Martin County	Williamston	\$3,050,000	\$1,170,000	\$3,030,000	\$7,250,000	10	40	\$1,860,000	\$2,210,000	\$151,000
MRH	Michael J Smith Field	Beaufort	\$19,450,000	\$8,890,000	\$5,370,000	\$33,710,000	60	120	\$3,220,000	\$5,130,000	\$515,000
43A	Montgomery County	Star	\$870,000	\$330,000	\$210,000	\$1,410,000	10	10	\$190,000	\$240,000	\$73,000
SOP	Moore County	Pinehurst/Southern Pines	\$41,930,000	\$8,140,000	\$6,260,000	\$56,330,000	150	300	\$7,250,000	\$10,610,000	\$1,264,000
MWK	Mt Airy/Surry County	Mount Airy	\$655,230,000	\$43,770,000	\$39,540,000	\$738,540,000	1,290	2,420	\$72,630,000	\$94,330,000	\$32,815,000
W40	Mt Olive Municipal	Mount Olive	\$8,610,000	\$4,830,000	\$2,340,000	\$15,780,000	60	120	\$2,170,000	\$3,760,000	\$338,000
EDE	Northeastern Regional	Edenton	\$3,290,000	\$1,540,000	\$1,630,000	\$6,460,000	20	40	\$1,240,000	\$1,550,000	\$176,000
W95	Ocracoke Island	Ocracoke	\$1,360,000	\$860,000	\$290,000	\$2,510,000	10	20	\$350,000	\$510,000	\$45,000
60J	Odell Williamson Municipal	Ocean Isle Beach	\$530,000	\$1,850,000	\$930,000	\$3,310,000	<10	10	\$120,000	\$190,000	\$22,000
TDF	Person County	Roxboro	\$51,650,000	\$9,170,000	\$7,070,000	\$67,890,000	100	220	\$10,410,000	\$14,320,000	\$880,000
PMZ	Plymouth Municipal	Plymouth	\$1,150,000	\$1,700,000	\$940,000	\$3,790,000	10	20	\$420,000	\$580,000	\$44,000
TTA	Raleigh Exec Jetport at Sanford-Lee County	Sanford	\$17,160,000	\$13,340,000	\$9,550,000	\$40,050,000	110	220	\$5,470,000	\$11,630,000	\$919,000
RCZ	Richmond County	Rockingham	\$420,000	\$100,000	\$100,000	\$620,000	<10	10	\$130,000	\$170,000	\$21,000
SIF	Rockingham County/NC Shiloh	Reidsville	\$28,770,000	\$17,090,000	\$12,590,000	\$58,450,000	140	440	\$10,030,000	\$18,300,000	\$867,000
RWI	Rocky Mount-Wilson Regional	Rocky Mount	\$15,080,000	\$7,020,000	\$3,570,000	\$25,670,000	50	120	\$3,240,000	\$5,370,000	\$1,032,000
RUQ	Rowan County	Salisbury	\$62,810,000	\$17,950,000	\$17,230,000	\$97,990,000	300	710	\$20,650,000	\$30,030,000	\$2,935,000
FQD	Rutherford County-Marchman Field	Rutherfordton	\$1,790,000	\$640,000	\$360,000	\$2,790,000	20	30	\$400,000	\$600,000	\$161,000
CTZ	Sampson County	Clinton	\$1,020,000	\$890,000	\$490,000	\$2,400,000	10	20	\$390,000	\$550,000	\$97,000
EHO	Shelby - Cleveland County Regional	Shelby	\$27,340,000	\$6,550,000	\$5,140,000	\$39,030,000	100	220	\$7,030,000	\$10,100,000	\$860,000
SCR	Siler City Municipal	Siler City	\$2,870,000	\$1,460,000	\$460,000	\$4,790,000	20	40	\$1,660,000	\$2,880,000	\$295,000
INT	Smith-Reynolds	Winston-Salem	\$272,260,000	\$135,670,000	\$97,810,000	\$505,740,000	1,620	4,390	\$94,060,000	\$201,490,000	\$13,119,000
VUJ	Stanly County	Albemarle	\$60,680,000	\$24,870,000	\$16,580,000	\$102,130,000	170	660	\$14,450,000	\$29,080,000	\$785,000
SVH	Statesville Regional	Statesville	\$25,610,000	\$8,120,000	\$6,950,000	\$40,680,000	170	290	\$6,440,000	\$9,490,000	\$2,420,000
ETC	Tarboro-Edgecombe County	Tarboro	\$5,340,000	\$2,590,000	\$890,000	\$8,820,000	30	70	\$1,020,000	\$1,770,000	\$197,000
LHZ	Triangle North Executive	Louisburg	\$5,440,000	\$9,140,000	\$8,660,000	\$23,240,000	60	120	\$2,430,000	\$4,360,000	\$511,000
ASJ	Tri-County	Ahoskie	\$980,000	\$1,120,000	\$2,520,000	\$4,620,000	<10	20	\$610,000	\$720,000	\$52,000
OCW	Warren Field	Washington	\$8,400,000	\$3,790,000	\$4,070,000	\$16,260,000	70	140	\$3,510,000	\$4,950,000	\$446,000
GWW	Wayne Executive Jetport	Goldsboro	\$26,920,000	\$14,630,000	\$5,520,000	\$47,070,000	120	310	\$6,680,000	\$13,740,000	\$1,001,000
RHP	Western Carolina Regional	Andrews	\$31,780,000	\$8,810,000	\$7,110,000	\$47,700,000	120	280	\$9,320,000	\$12,110,000	\$478,000
UKF	Wilkes County	North Wilkesboro	\$3,380,000	\$1,230,000	\$800,000	\$5,410,000	40	60	\$1,110,000	\$1,500,000	\$315,000
	GE	NERAL AVIATION TOTAL	\$2,736,650,000	\$808,510,000	\$491,080,000	\$4,036,240,000	10,550	23,610	\$541,010,000	\$956,000,000	\$122,575,000
		COMBINED TOTAL	\$10,221,210,000	\$9,855,270,000	\$11,101,610,000	\$31,178,090,000	40,610	123,420	\$2,398,480,000	\$4,167,150,000	\$912,689,000

Airports in North Carolina provide \$31 billion in economic impact, support 123,400 jobs across the state, and contribute \$913 million in government revenue each year.



Increased Job Opportunities

Increased Spending

Increased Government Revenue



Our Mission Statement

Promote the economic well-being of North Carolina through air transportation system development and improved aviation safety and education.

For more information:

N.C. Department of Transportation Division of Aviation 1560 Mail Service Center Raleigh, North Carolina 27699-1560

To download a copy of this booklet and the full report, visit www.ncdot.gov/aviation

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